Running a Bulk Mail Merge

Go to the Custom View that you would like to send the letter from. I.e Tenant, Owner Property or supplier

We are going to use Tenant. In the custom view list, select the custom view you want or just select the Tenant List view

Select the template you require by clicking on the drop down arrow besides "Select a Template"

Select a user,

Only select dates if you are doing an Inspection Letter

Then select if you are only going to Email or Print as well

This is done by clicking on the drop down arrow next to Email and choosing Both, yes or no. This will auto filter the list.

You can further filter by just ticking those tenants you want to send the letter to

When ready click on Merge (Top right hand side) This will take you to the actual letter – you can make changes here. When ready either click on Print or Email

If Print, it will take to you a preview screen where you can see the letters and then click on Print from there.

If Email, click on Email and it will pop up a screen where you can put in the subject line, select who from. If you want to add another attachment you can and then click on Send Emails

These process sheets are a quick guide, for more detailed information please still use the Help Files